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walking distance, it is easy to walk from one attraction to another and enjoy various programmes almost all day.

The analysis proved that the goal has been fully reached and that Zagreb has become actually an open theatre which enables interaction with spectators, who can even dance at the sounds of music in the Music Pavilion and win awards.

The feedback has been very positive, both from tourists and citizens. The history and culture are presented in an unusual and unforgettable interactive way. Hotels and agencies use the programs to increase the value of their own product and many citizens became regular visitors.

However the Zagreb Time Machine should continue to be strongly promoted and new attractions should be added every year in order to make vivid and interesting the project.

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Comparative Analysis of the Hostel Sector in Macedonia and Bulgaria

Abstract

This article aims to present a comparative analysis of the hostel sector in Macedonia and Bulgaria. For the purposes of the present study an exploratory (qualitative) research was made to analyze the current condition of the hostel sector in both countries. Secondary data sources were used, by consulting the relevant literature from the hostel sector and Internet. Furthermore, several informal interviews with hostel owners in Skopje and Sofia were conducted to obtain first-hand information related to different aspects of the operation and the development of the hostels. Moreover, a comparative analysis of the tourism sector and the hostel tourism is graphically presented in a table.

The research is divided to several parts that cover definition of the hostel sector; its historical development; the trends in the hostel business; the profile of the tourists that chose hostels for accommodation; and recommendations for the development of the sector in Bulgaria and Macedonia.

Key words: tourism, hostel, Macedonia, Bulgaria

Definition and historical development of hostels

The hostel can be defined as a facility that provides clean, neat, affordable accommodation for young people who travel in their own country or abroad, individually or in groups, for educational purposes or vacation (Bhatia, 2002). These are places where young people from a different social status and nationality meet, places for recreation and friendship. In the hostel, guests often pay for a single bed rather than a room, share a common bathroom, living room and kitchen. It is intended for particular segments of the tourism market, such as young people (Medlik, 2003). Hostels can offer additional services such as food, information, etc. They are mainly located in city centers or near train stations and public transport facilities (Heyns et.al, 2000).

The hostel industry, as we know it today, began to develop in 1907, when Richard Schirrmann, a teacher from the small town of Altena in Germany, decided to adapt one of the empty classrooms for an accommodation and overnight stay for students. This idea was not entirely unique, as inns and taverns in Austria already offered accommodation at reduced prices for students since 1885. But Schirrmann had even bigger plans; he managed to develop a movement (Karr, 2014). His idea was to attract students from industrial towns to rural areas. Schirrmann was deeply convinced that walking and cycling in the fresh air is of great importance for the development of youth and their learning. But these trips would not be possible without a place in which

one can reside. His logic was simple because rural schools were empty on weekends and holidays, he decided to use them as accommodation facilities. For this purpose he chose a school where ground rules for accommodation were set. Students were responsible for displacing the benches and chairs in classrooms and setting up straw mats on the floor, and again early in the morning would return them to the previous position. Male and female students were located in separate rooms but were treated equally. The experiment was successful and Altena became a haven for students' excursions in rural areas, but the accommodation in other places became a problem. Therefore, Schirrmann in 1909 decided it was time to expand his movement outside of Altena. His goal was to create and establish a network of hostels that are not too distant from each other.

After the First World War his movement really began to expand. By 1928 there were already more than 2,000 hostels worldwide. International Hostel Federation (now Hostelling International) was founded in Amsterdam in 1932, by representatives of several countries like Switzerland, Czechoslovakia, Germany, Poland, Netherlands, Norway, Denmark, England, Ireland, France and Belgium. In the period after the Second World War the number of hostels have increased constantly, and today there are over 90 Hostel associations with more than 4,500 hostels in over 80 countries worldwide (Staerman, 2010).

Trends in the hostel sector

There are several trends in the modern hostel work and we will focus on the information systems for reservation, hostel chains and their management, increase in the level of service quality and development of hostel product. Currently there are few effective information systems that specialize in the hostel offer worldwide. These systems provide reviewing, booking and renting overnight stays and additional services in hostels. Of course, these systems work for a particular commission, and most known are to be hostels.com, hostelworld.com, hostelbookers.com and hostelz.com. The success of the operation and the free movement of capital and investment lead to the opening of hostel chains, the biggest of which are presented in Table 1. The ranking is done according to the number of beds in hostels as accommodation in hostels mostly is in rooms with 4, 6, 8 or more beds. The increase in the minimum servicing standards (welcoming, comfort, cleanliness, security and privacy) aimed at young tourists led to trend in hostel opening towards new markets such as family and business travelers. Hostel product offered on the market contains the following elements:

- Collective and animation rooms in a hostel offer a relaxed atmosphere that allows guests (individual or group) to meet and socialize. Organized events, bars and use of social networks and technologies create new types of social interaction;
- Private rooms with toilet and bathroom, separate rooms for women and high quality facilities, rooms, interior and equipment;
- Attractive prices and
- Location in city centers, close to public transport and city attractions.

Table 1. Hostel chains in Europe

No.	Hostel chain	Number of hostels	Total Number of beds
1.	A&O	22	14000
2.	Meininger	17	7000
3.	Generator	11	5000
4.	St Christopher's Inns	17	2000
5.	Wombats	6	1900
6.	Equity Point	9	1800
7.	Plus Hostels	3	1100
8.	Hip Hop Hostels, Paris	12	1000
9.	Euro Hostels, UK	3	900

Source: HVS (2013). The sharing market commercial hostels in Europe.

Profile of tourists staying in hostels

Latest research (HVS, 2013) provide the following information about the profile of tourists staying in hostels: 5% of the guests are business tourists, 12% are couples, 18% are family guests, 20% are individual guests and 45% are groups of young tourists. These groups of young tourists are called backpackers.

Although the meaning of the term backpacker is widespread and well known, there is still no single definition that is accepted by the academic staff and the hospitality industry (Hampton, 2013). Approaches in research related to backpacking tourism can be divided into two basic types: Anthropological and market-oriented (Hannam & Ataljevic, 2008).

Backpacking or backpacker tourists is a form of low budget, individual international travel. It involves use of a backpack or other type of baggage that is easy to carry on long distances and for long periods, use of public transportation, accommodation facilities that are relatively cheap (as hostels are), longer average length of stay compared to other types of tourism (up to 60 days), visit to several countries during travel, interest in learning about the local people and its culture, visit to attractive places in the destination point and a number of activities. These tourists inform themselves intensively (mostly from the Internet and handbooks) before planning and undertaking travel. It is most often associated with young people who have fewer responsibilities and more free time to travel. Also, they have fewer resources to spend on accommodation of higher category and vehicles. Very important to backpacking tourists is the sense of authenticity. This kind of tourism tends more towards educational motives for travel rather than leisure or recreation. Backpackers want to feel the real atmosphere that exists in the destination and therefore they don't participate in the package arrangements intended for mass tourism. This segment of tourists is very important for international tourism and in recent decades it is constantly growing. Studies on backpacking tourists show that although relatively young, these tourists have made an average of six inter-continental travels. Most of the tourists visit Europe, over

50%, followed by North America and other continents (Richards & Wilson, 2004). A survey on backpackers in Europe showed that the majority of the survey participants (52%), travel more than four times a year (Majstorović et. al, 2013). On the other hand, hostels aimed for backpackers represent a rapidly growing segment of the tourism industry with an evident growth in the recent decades (Berger & Paris, 2013).

Table 2. The proportion of backpackers from the total number of tourists for the selected destinations

No.	Destination	Proportion of backpackers from the total number of tourists
1.	Australia	49.5
2.	Canada	26.7
3.	France	35.4
4.	India	66.7
5.	New Zealand	65.0
6.	Thailand	75.4
7.	Turkey	40.7
8.	Great Britain	30.8
9.	USA	22.8
10.	Vietnam	87.5

Source: Richards, G., Wilson, J. (2004). *The Global Nomad: Backpacker Travel in Theory and Practice*. Channel View Publications.

Considering the table, we can draw the conclusion that backpackers represent a great percentage of the total number of tourists. This percentage is highest in Vietnam 87.5 %, Thailand 75.4 % and India 66.7 %.

One of the key moments in the development of backpacker tourism in recent years has been the introduction of the term "flashpacker". The so-called flashpacker is a new kind of modern travel and reflects demographic changes in western societies such as marrying later, having children later, the development of new technologies, increased revenue and free time for leisure and more. Flashpacker can be defined as twenty or thirty-something-year old backpacker traveling with expensive backpack, accommodating in different types of facilities depending on their location, having higher income available, carrying a laptop and a mobile phone and identifying with the mainstream backpacker culture (Hannam & Diekmann, 2010).

Comparative analysis of the hostel sector in Macedonia and Bulgaria

For the comparative analysis we use certain criteria and parameters. In our case, as the parameters of the research we have used territory, population, the number of foreign tourists in both countries, properties in the UNESCO World heritage list and the number of hostels (shown in Table 3 below). According to these data, we can observe

that Bulgaria as a territory and population is almost four times bigger than Macedonia and has 17 times bigger number of international tourists and eight more properties included in the UNESCO World heritage list. It is interesting that the number of hostels in Bulgaria as a highly developed tourist country is 41, compared to 23 who are in Macedonia, so in both countries together we have 64 hostels. The data suggest that both countries need a larger number of these type of facilities. Although hostels carry relatively "low" income the barriers for entering and exiting the hostel business are not large for entrepreneurs who want to work in the field of hospitality and tourism. In this way, on one hand, hostel sector reduces unemployment and increases the economic position of these entrepreneurs, on the other hand accommodation facilities are opened for the large number of tourists mostly backpackers.

Table 3 Comparative analysis of international tourism, UNESCO World heritage list properties and number of hostels in Macedonia and Bulgaria

Country	Population (000)	Area in km2 (000)	International tourist arrivals (000) in 2013	UNESCO World heritage list properties	Number of hostels
Macedonia	2,054	25,713	400	1	23
Bulgaria	7,517	110,994	6,897	9	41

Source: UNWTO Tourism highlights, 2014 Edition. UNESCO World Heritage List. www.hostelworld.com

Table 3 provides an overview of hostels in Macedonia and Bulgaria (hostelworld.com), and according to the data we can conclude that Macedonia has 23 hostels, most of which are located in Skopje 17, three are located in Bitola and three are located in Ohrid. There are hostels missing in other major cities, such as Kumanovo, Prilep, Tetovo, Strumica, Stip and other cities, but we anticipate that such facilities may be opened in these cities in the near future. It is understood that the positioning of most hostels is in the capital Skopje, which is statistically visited by most of the foreign tourists and is located on the backpackers' route (main hostel market). In Bulgaria there are 41 hostels, most of which are located in Sofia 21, 8 are located in Plovdiv, 4 in Varna, three are located in Veliko Trnovo, two in Burgas, Bansko, Ruse and Sozopol with one hostel. There are hostels missing in other major cities, such as Blagoevgrad, Stara Zagora, Kyustendil, Vidin and other cities, but we anticipate that such facilities may be opened in these cities in the near future. It is understood that the positioning of most hostels is in the capital Sofia and Plovdiv and is located on the backpackers' route (starting from Istanbul finishing in western European countries).

Recommendations for development of the hostel sector in Macedonia and Bulgaria

In order to improve the hostel sector in the Macedonia and Bulgaria, it is desirable that the following recommendations are taken into account (Taskov; Dimitrov; Metodijeski, 2014):

- Introduction of hostel operations in formal education through curricula and teaching practice in secondary hospitality-tourism schools and Faculties of Tourism and Hospitality;
- Change of legislation and categorization of hostels;
- Implementation of international standards for quality in hostel operations;
- Consolidation of the hostels in the Republic of Macedonia into a national association;
- Establishment of service provider for the needs of tourists staying in hostels (networking of taxi companies, transporters, hospitality facilities, tour guides, agencies, museums, galleries, public sector, tourist information centers, artisans etc.);
- Organization and participation in international conferences and representation of best practices from hotel business;
- Development of hostel product;
- Development of hostel network between two countries;
- Support to environmental campaigns provided by hostels and
- Conduct of research related to hostels as a hostel profile in the Republic of Macedonia and a profile of tourists staying in hostels etc.

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